



(1942/9B)  
(1942/9C)

BUSINESS STATISTICS - SEPTEMBER 30th, 1942.

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## PART I      PRIMARY AND EXPORT INDUSTRIES.

### GENERAL.

Seasonal Conditions.      Following a dry month in August, there has been little relief in September. Pastoral conditions are good except in coastal areas and the north-west plains. Sheep are in fair to good condition but in some districts pasture growth has been inadequate to sustain cattle in first class condition. Drying off is fairly general. Good rains are required in most wheat areas and generally throughout the State, the need being paramount in coastal districts.

Rabbits are increasing and blowflies are becoming very active in pastoral districts.

Potatoes.      A severe shortage of potatoes during the next few weeks will be followed by a supply equal to about  $\frac{1}{2}$  lb. per head per week in November rising to perhaps 2 lbs. in January, 1943, according to the Minister of Supply. The official production goal is 500,000 tons of potatoes. In 1936-37 461,000 were produced in Australia but in 1938-39 only 274,000 tons.

Meat.      An order gazetted recently gives the Minister for Commerce power to proclaim two beefless days a week.

From Sept. 28th the Commonwealth Government has paid the same price for beef and pork as the U.K. export contract price. Formerly 15% less was paid. Beef and pork have thus been brought into line with mutton.

Britain's offer to purchase Australian dehydrated mutton is at present restricted to 100 tons a month. Frozen meat required this year was only 110,000 tons compared with 260,000 tons in the first year of the war.

A Meat Industry Commission is to be set up by the Commonwealth to control distribution for civilian consumption, the armed forces and export. The Commission will stimulate production, ensure an adequate return to the grower and advise on the control of prices and, if necessary, rationing methods.

Food Supply.      The Food Council does not expect any shortage of the foods necessary to satisfy the needs of the great mass of the civil population. Dehydrated lucerne is expected to provide large quantities of vitamin C.

The area planted for the new rice crop in New South Wales is expected to exceed 34,000 acres against 23,700 last year. No rice is being released for civilian use.

The Food Council reported an expanded programme of food drying and processing. In the spring and summer a ten-fold expansion in output was expected and the production goal provided for treatment of 160 m. lbs. of raw vegetables.

A comprehensive programme of rural production, based on quotas fixed by the Food Council in behalf of the Dept. of War Organisation of Industry, will be organised by State Agriculture Depts. and District War-Time Agricultural Committees. The Dept. of Commerce is to provide £50,000 for the finance of these local committees.

Rural Manpower needs may necessitate the transfer of men from unessential secondary industries. A census is being taken of skilled rural workers in the forces but such men would be drawn upon only in extreme emergency. Most men engaged in rural industries are now prevented from taking work in secondary industries and former rural workers engaged in industrial employment upon becoming unemployed, may be prevented from taking work other than rural.

The Minister for War Organisation of Industry stated on 30th September that drastic reorganisation would be necessary in rural industries where there was excess production. Production of wheat, apples and pears exceeded requirements, he said.

A nutrition committee is being set up in N.S.W., in conformity with action already taken in other States, under the aegis of the Food Council. The Committee will advise on civilian consumption.

/Eggs. ....



Eggs. By arrangement with the Prices Commission, the wholesale price of eggs in each State will be fixed by the local Egg Boards. Retailers' margins have been fixed at the following maxima:-

Wholesale price less than 1/-	.....	2d.
" " 1/- to 2/-	.....	3d.
" " over 2/-	.....	4d.

Prices will not be uniform in the States. Exports last year of eggs in shell declined from the high level of 1940-41 by nearly two-thirds but there was a great expansion of exports of powdered egg.

#### EGGS - EXPORTS FROM AUSTRALIA.

<u>Eggs in Shell.</u>		<u>Egg-Contents</u>	
<u>Quantity.</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>
'000 doz.	£000	'000 lbs.	£000.
1938-39	10,144	650	23
1939-40	10,279	1	-
1940-41	17,882	1,095	45
1941-42	6,307	5,910(a)	763

(a) Mainly powdered egg; in previous years egg-content was mainly egg pulp.

Fruit. The Commonwealth Government has taken control of citrus fruit (other than mandarins and washington navel oranges) and releases for the civilian market will be made when the Supply Department's requirements are met. The Government will pay growers (on rail, capital cities):- for Oranges, £16 per ton, Lemons £15.10.0 per ton, Grapefruit and Seville Oranges £20 per ton.

A board of inquiry has been set up to investigate the affairs of selling agents of the Apple and Pear Board. The Commonwealth Government intends to appoint a Government finance member to the Apple and Pear Board.

Wool: About one-fifth of the new season's clip has been appraised in N.S.W. Wool received into store in Sydney is nearly 30% below the quantity received in the same period last year, despite earlier shearing, so that considerable quantities are held in the country. Truck requirements cannot be met while other traffic is so heavy.

Priority in transport of wool to appraisement centres will be given to types of wool required for immediate shipment or use in Australia under the scheme recently announced by the Government (see B.S. 1942/8C).

In response to a request by the Central Wool Committee, bales are slightly heavier and thus fewer and this will expedite the handling of the clip.

Wool taken by local manufacturers in the last few years, according to the Review of the National Council of Wool Selling Brokers, has increased rapidly as follows:-

#### WOOL OBTAINED BY AUSTRALIAN MANUFACTURERS.

	<u>Av. 1935-36</u>	<u>1940-41*</u>	<u>1941-42*</u>
	<u>1938-39</u>		
'000 Bales.	232.2	376.5	470.5

\* Disposed of to local manufacturers by appraisements.

In U.S.A. official requirements of "Shearling" sheep pelts are 6,000,000. They carry wool  $\frac{1}{4}$ " to 1" in length and are made up into airmen's clothing. About 3 million pelts are produced locally.

The manufacture, sale or use of salt stock licks without authority is prohibited in Australia. According to an official statement the use of such licks is unnecessary in nearly all parts of Australia where natural feed is available.

/Very .....



Very large stocks of wool in Argentina (293 m.lbs.) and Uruguay await shipment and authorities in both countries are eager for U.S.A. to purchase the whole of the clips.

Wheat. Crop prospects continue to be favourable but rain is needed throughout the belt and urgently in some areas. Growers have been warned that transport difficulties may involve storage for some weeks before railing to ports. In Victoria silo space is short and serious congestion is expected.

State Agricultural Departments are to be given power to requisition hay harvesting, baling and pressing machinery and to pool these facilities.

A final advance of  $1\frac{1}{2}$ d. per bushel has been made from No. 2 (1939-40) wheat pool. The total payment now made is 3/7.9 (less freight) per bus. bagged (2d. less, bulk). Almost all the large crop in that year 195 m. bus., has been sold.

Total receipts of the pool were £38,690,717 from sales and flour tax (part). Costs amounted to £7,337,975 so that the net realisation paid to growers was £31,352,742 and averaged  $3\frac{1}{2}$ d. per bus. at country stations.

The price of cornsacks to wheat and barley growers f.o.r. capital cities as at 31st December next has been fixed at 12/7 a dozen. The price is above last year due to increased landed cost of jute.

Dairy products. Butter produced in N.S.W. factories in July, 1942 was 5.2 m. lbs., the decline from June being seasonal. For the seven month's period Jan.-July, 1942, production was 20% below last season.

The fifth progress report of the Commonwealth Parliamentary Committee on Rural Industries, tabled on 16th September, recommended an increase in the prices of dairy products.

Emergency returns collected from dairy products factories in N.S.W. reveal that to date 1,021 former suppliers have either vacated their farms or are not now producing dairy products. However, returns from over 13,000 dairy farmers, covering 78% of all cows on dairies, reveal that the number of cows on all dairies this year is greater than last year.

#### BUTTER PRODUCED - N.S.W. FACTORIES.

'000,000 lbs.

Year	Jan.	Feb.	Mar.	Apr.	May	June	July
1939	9.7	10.8	12.1	11.9	10.5	7.7	6.6
1940	12.6	10.6	9.6	9.2	7.3	5.1	5.0
1941	14.5	12.8	11.7	8.7	6.8	5.2	4.6
1942	6.7	8.3	10.1	8.6	6.8	5.5	5.2

Pay to suppliers of cream to certain North Coast butter factories during August was at the rate of  $13\frac{1}{2}$ d. per lb. the same as in July and  $\frac{1}{2}$ d. above August 1941. Deferred pay in the half-year ended June was 1d. a lb. (Table B.S. 1942/8B).

Quotas of butter and cheese for local consumption during September fell to little above previous seasons. The October quota for butter was reduced to 41% compared with 46% last year and 42% two years ago.

#### QUOTAS OF BUTTER AND CHEESE FOR LOCAL CONSUMPTION.

N.S.W., VIC., Q'LD. & TAS.

Month	BUTTER				CHEESE %			
	1934/35 <sup>x</sup>	1940/41	1941/42	1942/43	1934/35	1940/41	1941/42	1942/43
	%	%	%	%	%	%	%	%
July	50	73	64	84	75	51	61	68
Aug.	55	61	57	76	75	41	47 $\frac{1}{2}$	50
Sept.	50	54	51	53	75	39	36	43
Oct.	33 $\frac{1}{3}$	42	46	41	37	33	28	33 $\frac{1}{3}$
Dec.	24	39	38		38	31	29	
Mar.	32	44	47		58	50	42	
June	60	71	85		76	70	63	

<sup>x</sup> Year of record production in Australia. % Applies to South Aust. also.



Coal. Production of coal in N.S.W. in the fortnight ended 22nd August was about 520,000 tons, a record figure. Coal supplies have been reported to be low in Victoria, South Aust. and Western Aust. Threatened rationing of coal in S.A. has been postponed.

Tenders have been accepted by the N.S.W. Railways Commissioner for the supply of 1,860,500 tons of coal in the year ending Sept., 1943. There is an average increase in cost of a little over 1/- a ton compared with last year's prices.



## PART II. FINANCE AND TRADE.

### GENERAL.

Restaurants, hotels etc. have been prohibited from serving meals of more than three courses and costing more than the maxima allowed i.e. dinner 5/-, lunch 4/-, other meals 3/-. Another measure designed to economise expenditure and manpower is the prohibition of horse and dog racing on the first Saturday of each month.

The newsprint rationing scale has been adjusted to reduce consumption by a further 15%.

Late in September the issue was announced of codified regulations for the relief of persons other than the Forces who, directly through the war or Government action for the war, become unemployed or are injured through enemy action or while doing war-time duty (including injury to members of the Civil Constructional Corps). Provision is made for the after-care of evacuees taken from any threatened area.

### BANK CLEARINGS.

Bank clearings in Sydney during August (excl. Treasury Bills) were £99 m. and the index of clearings for the three months ended August moved to the high level of 135 (corresponding period 1926-30 = 100.)

Total clearings for the period Jan.-Aug. 1942 were £801.3 m. or 8.6% above last year (£738.2 m.). While civilian business is subject to restrictions, Government expenditure is increasing and money turnover is large.

#### BANK CLEARINGS - SYDNEY. Excl. Treasury Bill transactions.

Year	AMOUNT		Index Number (Base:- Av. corresp. period 1926-30 = 100).	
	August.	Eight Months Jan.-Aug.	Three months ended August.	Calendar year.
	£n.	£n.		
1938	72.9	614.5	101	101
1939	74.9	601.6	99	100
1940	83.6	706.6	118	113
1941	87.0	738.2	123	120
1942	99.0	801.3	135	-

### MORTGAGE BANK:

A bill to establish a Mortgage Bank as a Department of the Commonwealth Bank has been introduced into the Commonwealth Parliament. It is intended to provide for loans on first mortgage to primary producers not exceeding 60% of the value of a property or £4,000, whichever is the less; repayment will range up to 35 years at rates fixed by the bank but, it is hoped, not exceeding 4%. For the present, new investment will continue to be restricted to war-time requirements.

As rural indebtedness, excluding debts on implements and farming supplies, exceeds £400 m., rapid taking over of rural debts by the bank is not envisaged. The capital of the mortgage bank department will not exceed £4 m.

### SAVINGS BANKS AND WAR SAVINGS CERTIFICATES.

The increase in deposits in savings banks in New South Wales recently has exceeded two millions a month. In July the net excess of deposits over withdrawals was £2,793,000 and in August £2,396,000 or about 32% of the increase in savings bank deposits in August throughout Australia.

War Savings Certificates sales in N.S.W. in June, 1942 are estimated to have exceeded redemptions by £300,000 compared with £224,000 in May.

/SAVINGS.....



SAVINGS - NEW SOUTH WALES.

<u>£ Thousands.</u>		<u>Year ended August 31st. -</u>				
		<u>1939</u>	<u>1940</u>	<u>1941</u>	<u>1942.</u>	
<u>Increase in Savings</u>						
<u>Bank Deposits:</u>		647	(-) 3,883	6,643	10,010	
<u>Increase in Month -</u>	<u>Aug. '39</u>	<u>Aug. '40</u>	<u>Aug. '41</u>	<u>June '42</u>	<u>July '42</u>	<u>Aug. '42</u>
S. Bk. Deposits:	(-) 244	939	1,192	1,613	2,793	2,396
War Savings						
Certifs.Ø	-	444	196	300 <sup>(a)</sup>	x	x
(a) Estimated.						
Ø Purchases less redemptions.						
x Not yet available.						
(-) Denotes decrease.						

Net sales throughout Australia of War Savings Certificates in August were £700,000 compared with £789,000 in July. These sums are small in comparison with the accelerating increase in savings bank deposits.

BOND YIELDS & MORTGAGE RATES.

The yield on Commonwealth bonds maturing in five to ten years and taxed at current rates has been steady at £3.22 (£3.4.5) per cent. for several months. Bonds subject to taxation at 1930 rates have been stronger in recent months, the yield on bonds maturing in 5 to 10 years declined to £2.80 (£2.16.0) per cent. in August from £2.17.10 in July.

The Commonwealth Government has introduced a loan appropriation bill for £200 m. Unexpended loan appropriation of £86 m. remains from last year.

The £100 m. Austerity Loan, opening soon, has already been partly subscribed. The War Damage Insurance Commission, has invested £5m. in the loan.

The weighted average rate of interest on private first mortgages continues to decline. The rate on rural securities for the three months ended August was 4.8% and on urban securities 5.2%, in each case 0.1 less than the weighted average rate for the three months ended July.

YIELD ON COMMONWEALTH BONDS AND MORTGAGE RATES.

Period	COMMONWEALTH BONDS Ø			MORTGAGES +	
	Maturing in 5 - 10 years.		Maturing in 10 years or more, Taxed at 1930 rates.	Rural	Urban
	Taxed at full C/wealth rates %	Taxed at 1930 rates %			
1939	x	3.87	3.92	5.2	5.6
1940	(9 mths) 3.15	3.25	3.30	5.1	5.6
1941	3.17	2.95	3.10	4.9	5.5
1940 - Aug.	3.15	3.24	3.25	4.9	5.6
1941 - Aug.	3.20	2.91	3.16	4.9	5.5
1942- Jan.	3.22	2.92	3.04	5.0	5.5
- June	3.22	2.93	3.13	4.9	5.4
- July	3.22	2.89	3.13	4.9	5.3
- Aug.	3.22	2.80	3.03	4.8	5.2

Ø Last Wednesday in each month. Compiled by Commonwealth Bank.

+ Weighted average rate on private first mortgages registered in three months ended month shown.

x Not available.

/SHARE.....



SHARE PRICES.

Share prices on the Sydney Stock Exchange have shown extraordinary strength recently. The Statistician's index of the prices of 34 active shares in August was 167 or one point above January the month before controls were introduced. All groups contributed to the rise of the share price index in August; insurance shares showed strong recovery after lagging for a long period. The feature of the market is the strength of manufacturing companies' shares.

The Commonwealth Treasurer has prevented upward revision of maximum permissible prices which would normally have taken place on Sept. 15th and October 1st.

INDEX OF SHARE PRICES - SYDNEY.

Prices of ordinary shares - excl. banks. Par value = 100.

(Compiled by N.S.W. Government Statistician)

Average for Month.	Manufacturing & Distributing	Retail Trade	Public Utilities	Pastoral & Finance	Insurance	Total 75 Companies	34 Active Shares
1937-Mar.	214	204	181	169	281	190 <sup>(a)</sup>	201
1939-Aug.	213	168	156	118	264	174	182
1940-Aug.	197	150	131	112	227	155	168
1941-Aug.	222	170	137	127	249	170	186
1942-Jan.	199	154	136	116	236	157	166
-June	184	146	117	116	216	147	157
-July	191	150	118	115	217	150	163
-Aug.	198	150	120	117	224	153	167

(a) Highest point recorded.

The Sydney Stock Exchange Bureau's index of the prices of 34 ordinary industrial shares (1934 = 100) increased from 113.25 on 1st September to 115.46 on the 30th of the month.

REAL ESTATE SALES & MORTGAGES.

Business in real estate sales and mortgages in August continued at approximately the same low levels as during preceding months.

Amendments to the National Security (Economic Organisation) Regulations impose further restrictions on real estates transfers with the object of preventing speculation. All purchases of land and leases for three years or more are subject to the written consent of the Treasurer.

REAL ESTATE SALES AND MORTGAGES - N.S.W.

Year	S A L E S					M O R T G A G E S (a)				
	Monthly Average	June	July	Aug.	Eight months to Aug.	Monthly Average	June	July	Aug.	Eight Months to Aug.
	£000	£000	£000	£000	£n.	£000	£000	£000	£000	£n.
1938	3,118	2,898	2,894	4,262	25.8	2,247	2,604	2,285	2,184	17.8
1939	2,680	2,613	2,919	3,068	22.4	1,870	1,658	1,950	2,770	16.2
1940	2,588	2,464	3,217	2,259	20.1	1,375	1,305	1,748	1,099	11.8
1941	2,770	3,029	3,165	2,545	21.8	1,303	1,273	1,470	1,213	10.4
1942	-	1,266	1,540	1,671	15.3	-	599	622	451	6.0

(a) Incl. Renewals.

WHOLESALE TRADE

While in March Quarter 1942 the value of sales at wholesale in N.S.W. was 13.6% above the previous year in June Qr. it was slightly below. Sales in July, 1942, were £19.17 m. approximately equal to the average monthly sales in 1941.

/Employment.....



Employment of males in wholesale businesses is declining and although female employment is greater total employment is still considerably less.

NUMBER EMPLOYED - WHOLESALE TRADE  $\phi$ , N.S.W.  
(Thousands)

	<u>July, 1941.</u>	<u>Dec., 1941.</u>	<u>March, 1942.</u>	<u>June, 1942.</u>	<u>July, 1942.</u>
Males	29.1	28.5	27.6	25.4	24.9
Females	10.0	10.9	11.0	11.2	11.2
Total	39.1	39.4	38.6	36.6	36.1

$\phi$  Firms with pay rolls exceeding £20 p.wk.

WHOLESALE TRADE, N.S.W.

Sales by traders registered under Sales Tax Acts.  
Total, taxable and exempt goods.

	<u>1938</u>	<u>1939</u>	<u>1940</u>	<u>1941</u>	<u>1942</u>
	Sales - Millions.				
Calendar Year	193.0	200.3	202.8	229.0	-
March Qr.	45.7	45.6	47.9	50.7	57.6
June Qr.	48.7	48.1	49.8	59.6	58.8
Month of June	15.0	14.9	17.1	21.8	18.93
Month of July	16.2	15.3	16.7	17.6	19.17

The Minister of Supply has taken control of the sale of paraffin wax and office machines.

RETAIL TRADE.

Sales in large Sydney stores during July, 1942, were 15.6% below sales in July, 1941. In June, 1942 they were 19.1% below June of last year.

The value of stocks held in July by reporting Sydney stores was 14.7% above last year but prices have increased considerably during the interim.

Some indication of the declining volume of business and the effect of the man-power call-up is given by the decline in staff employed by reporting shops to a level 15.1% below last year. The wages bill has declined 11.8%. Further details of employment in retail trade are given below.

The Rationing Commission intends to curtail advertising of rationed goods.

RETAIL TRADE - SYDNEY.

Percentage increase from corresponding period of previous year.

Period	Net Value of Sales.	Value of Stock	Wages & Salaries Paid	Number of Employees.
1939	+ 2.4	+ 2.0	+ 2.6	+ 0.9
1940	+ 6.3	+ 17.0	+ 4.0	+ 1.9
1941	+ 14.6	+ 8.0	+ 9.0	+ 4.0
Jan.-June 1941	+ 17.5	+ 1.8	+ 6.9	+ 3.2
" " 1942	+ 3.7	+ 13.5	+ 3.8	(-) 1.5
1942 - Mar.	+ 25.9	+ 11.5	+ 4.6	+ 0.6
Apr.	+ 25.6	+ 8.7	+ 7.8	+ 0.1
May	(-) 8.7	+ 11.5	(-) 0.3	(-) 3.4
June	(-) 19.1	+ 10.5	(-) 1.7	(-) 10.9
July	(-) 15.6	+ 14.7	(-) 11.8	(-) 15.1

(Supplied by Retail Traders' Association in conjunction with the Commonwealth Bank).



Pay Roll Tax returns, summarised by the Commonwealth Statistician, show the loss of men and part replacement by women in retail shops. The figures shown below include all types of employees of firms whose principal activity is retailing.

PAY ROLL TAX RETURNS - N.S.W.

EMPLOYEES OF TAXABLE EMPLOYERS<sup>x</sup> - RETAIL TRADE.

	<u>July 1941</u>	<u>Sept. 1941</u>	<u>Dec. 1941</u>	<u>Mar. 1942</u>	<u>June 1942</u>	<u>July 1942</u>
<u>TOTAL</u>						
Males ('000)	31.9	31.8	31.9	28.5	25.5	24.9
Females ('000)	31.8	31.7	35.2	33.0	32.7	32.1
Total ('000)	63.7	63.5	67.1	61.5	58.2	57.0

x Employers with wages bill exceeding £20 per week whose principal activity was retail trade.

The Black Markets Act provides drastic penalties for "black marketing" which includes major offences under National Security Regulations dealing with prices, rationing of goods and services, restriction of stock, control of production and acquisition of primary products. It applies to buyers as well as sellers. Minimum penalty for an individual convicted by a magistrate is three month's gaol and for a company a fine of £1000. Heavier penalties will apply upon conviction before a jury. Goods involved in an offence or their value are forfeited to the Crown.

DRINK BILL-N.S.W.

Expenditure on beer and spirituous liquors in N.S.W. in 1941 was estimated at £20,970,000, equal to £7.11.5 per head. Record quantities of beer and wine were consumed but the increase in the quantity of beer (169,000 ballons) was small. Consumption of wine increased by 291,000 gallons.

MANUFACTURING.

The estimated total number employed in factories and workshops in New South Wales in June, 1942 was 285,700. From May there was a decline of 1,400 due to a decrease in males employed. Essential and war industries, however, employed both more men and more women while employment in paper and printing, furniture, clothing and other manufacturing declined.

The estimated total number employed in factories in July is not yet available but indications are that females increased by over 1,000 while males declined, the net result being an increase of some hundreds.

NUMBER EMPLOYED IN FACTORIES - N.S.W.

(Including Working Proprietors).

Period.	1938-39		1939-40		1940-41		1941-42 (a)	
	M.	F.	M.	F.	M.	F.	M.	F.
Av.No.Employed, Whole year.	'000	'000	'000	'000	'000	'000	'000	'000
No. employed in -								
July	167.2	61.6	172.3	64.7	194.2	71.6	214.5	78.7
Dec.	165.2	60.4	165.9	59.8	180.0	66.0	209.2	75.1
Mar.	166.2	62.2	175.4	64.5	194.1	72.1	215.5	78.1
Apr.	167.0	62.0	175.1	66.5	202.3	73.9	215.8	80.8
May	165.9	61.5	171.3	65.9	200.6	73.1	215.8	80.7
June	166.6	61.2	x166.6	x64.5	204.9	73.8	215.8	81.3
	166.9	60.4	173.7	64.7	207.6	74.2	214.4	81.3

(a) Subject to revision.

x Coal strike - April-May, 1940.

/Plans.....



Plans are being made by the Dept. of War Organisation of Industry for rationalising dry cleaning, laundry, pastrycook and furniture manufacturing industries and beauty salons. A large number of rationalisation schemes have been adopted voluntarily by various industries.

The Department of W.O.I. has in hand a scheme which requires any person wishing to set up a manufacturing business or to undertake new lines of production to obtain a permit from the Dept. of War Organisation of Industry.

Reference was made in Part I to the statement of the Minister for War Organisation of Industry that reorganisation is necessary in rural industries where there is excess production.

A committee has been established to supervise plans for increased manufacture of wool and cotton. For the present attention will be focussed on the spinning section of the industry which is the chief bottleneck.

Absenteeism, particularly of females from textile factories has created problems. Officers of the Man Power Directorate are engaged in a survey of absenteeism in war factories.

The annual report of the Tariff Board points out that many new industries have been established under war conditions when oversea competition is precluded and some developments have taken place at the instance of the Government.

The Board was asked on 19th May 1942 to make recommendations upon "all aspects of the general problem of the re-establishment of secondary industries as part of the Commonwealth reconstruction plan". This work is proceeding.

With regard to trade policy after the war the Board makes some suggestions to help implement the principles of the Atlantic Charter & the Mutual Aid Agreement.

#### EMPLOYMENT.

The estimated total number of non-rural wage and salary earners (excl. private domestics) employed in N.S.W. at the end of June, 1942 was 770,900. Details for June and earlier months were given in tables in B.S.1942/9A.

Preliminary tabulations reveal that from June to July, 1942, males privately employed again decreased by a few thousand while Government employment increased by over 2,000 including several hundred women taken on by Government factories and a large number of men employed on defence works.

After the Senate had disallowed the regulations constituting the Women's Employment Board, an Act to provide for such a board was subsequently passed by the Commonwealth Parliament.

Public holidays at Xmas this year will extend from Friday 25th Dec. to Monday 28th. New Year's Day, 1st Jan. 1943, will be an ordinary working day. Work will be compulsory on Anniversary Day but holiday rates must be paid.

National Service Offices in New South Wales in July sent over 12,000 males and nearly 3,000 females to employment. These figures exceeded those of any previous month.

#### NATIONAL SERVICE OFFICES, N.S.W.

Number of persons sent to employment.

Status	May, 1942.			June, 1942			July, 1942.		
	M.	F.	T.	M.	F.	T.	M.	F.	T.
Adults	6,899	1,987	8,886	7,303	1,858	9,161	10,765	2,028	12,793
Minors	840	478	1,318	1,206	619	1,825	1,612	731	2,343
Total	7,739	2,465	10,204	8,509	2,477	10,986	12,377	2,759	15,136

/The number.....



The number of males remaining on the registers and awaiting employment declined from 1,913 at the end of June to 1,786 in July. In the metropolitan area the decline has been very rapid in the last few months but in country areas there has been little change.

N.S.W. - UNEMPLOYED MALES REGISTERED.  
END OF MONTH.

District.	March 1942	April 1942	May 1942	June 1942	July 1942
Metropolitan Area (incl. Liverpool and Penrith)	1,340	1,543	839	463	388
Bathurst, Orange and Dubbo	250	304	261	134	158
Cootamundra, Young and Wagga	249	197	125	188	193
Albury and Broken Hill	68	147	274	389	389
Newcastle and Maitland	198	118	286	241	233
Tamworth and Inverell	87	121	142	263	260
All other areas.	249	258	259	235	165
Total, N.S.W.	2,441	2,688	2,186	1,913	1,786

(c) Includes Factories.



PART III. INDUSTRIES, etc.

BUILDING. New buildings commenced in the Metropolitan Water Board area during August, 1942, were estimated to cost £273,000 or only about a third of the cost of buildings commenced in November, 1941 although factory construction now greatly exceeds last year.

Males employed on the construction and repair of buildings in N.S.W. by employers whose pay rolls exceed £20 per week have declined from 14,730 in July, 1941. to 11,831 in July, 1942. A good deal of this employment is now on account of air raid protection the cost of which is not included in the tables below.

BUILDINGS COMMENCED - METROPOLITAN  
WATER BOARD AREA.

Period.	Dwelling Houses (excl. Flats.)	VALUE - £'000.						Grand Total.
		Dwelling Houses	Flats	Business Premises(a)	Misc.	Total.		
						City	Suburbs	
	Number.							
1938	7,457	6,001	2,481	3,496	564	2,007	10,535	12,542
1939	7,341	5,967	1,955	3,130	955	1,800	10,107	11,907
1940	7,161	6,157	2,341	2,795	1,581	1,545	11,329	12,874
1941	7,177	6,556	2,450	1,738	1,074	706	11,112	11,818
1941 Nov.	634	547	162	83	31	26	797	823
1942 Jan.	334	294	57	66	99	13	503	516
June	30	19	-	775	48	81	761	842
July	22	32	1	200	50	21	262	283
Aug.	17	22	-	204	47	43	230	273

(a) Includes Factories.

Permits to commence private building estimated to cost £107,000 (including factories £88,000) were issued in August, 1942. These figures showed an increase over July but in each case factory construction or additions covered nearly the whole amount involved.

Government building contracts let during the month of August covered work valued at £358,000. Buildings erected by Government authorities (incl. the Allied Works Council) by day labour are not recorded.

For the eight months Jan.-Aug., 1942, private building permits were issued for buildings estimated to cost £881,000 or about one-ninth of the corresponding figure last year. On the other hand Government building contracts were let for £2,953,000 or slightly above last year.

NEW SOUTH WALES.  
PRIVATE BUILDING (PERMITS - METROPOLIS) AND GOVERNMENT  
BUILDING (CONTRACTS).

Year	Month of August.			Eight months ended August.		
	Private.ø (Permits)	Government (Contracts accepted).		Private ø (Permits)	Government (Contracts accepted).	
	City & Subs.	City & Subs.	Other, N.S.W.	City & Subs.	City & Subs.	Other, N.S.W.
	£000	£000	£000	£000	£000	£000
1938	1,202	x	x	9,738	x	x
1939	1,209	418	14	8,816	x	x
1940	956	54	261	7,307	546	2,206
1941	974	140	237	7,805	1,196	1,581
1942	107	165	193	881	734	2,219

ø Includes additions and alterations.

x Not available.

/RAILWAYS.....



RAILWAYS.

Passengers carried in 1941/42 by the N.S.W. Government railways were a record at 218.8 million, an increase of nearly 13% on the previous year. Goods hauled increased by slightly more than 3%, working expenses by 26%. Large items in the increase in costs were wages and salaries (£228,000), Commonwealth Pay Roll Tax (£304,000) and War damage insurance (£107,000).

During July, 1942, passenger and freight traffic was heavy, revenue exceeded last year by £678,000 and the working surplus shown in the railways' accounts was £1,108,000.

N.S.W. GOVERNMENT RAILWAYS.

Year	MONTH OF JULY.			YEAR ENDED 30th JUNE.		
	Passenger Journeys	Tonnage of goods and Livestock	Excess of Revenue over Work-ing Expenses <sup>ø</sup>	Passenger Journeys	Tonnage of goods and Livestock	Excess of Revenue over Work-ing Expenses <sup>ø</sup>
	Million	'000	£000	million	'000	£000
1939	15.2	1,386	370	186.7	15,417	4,603
1940	15.5	1,801	808	179.1	+ 14,620	5,308
1941	16.8	1,460	623	194.1	18,032	6,054
1942	18.3	★ 1,659	1,108	218.8	★ 18,651	5,974

ø Excl. interest, sinking fund and exchange, which amounted to £n.6.56 in 1939/40 and £n.6.42 in 1940/42.

+ Coal strike March 11 - May 17, 1940, adversely affected operating results.

★ Partly estimated.

MOTOR VEHICLES.

The number of active registrations was slightly higher in August, 1942, than in July but there have been only minor movements in recent months and the total has remained fairly steady.

Further restrictions have been placed on the use of substitute fuels. A permit is now necessary for users of rectified spirit and shale oil and only the specified amount will be obtainable monthly. The object is to divert supplies to vehicles of highest priority.

The prices of mineral and lubricating oils have been increased to pass on higher landed costs. Motor oil prices are increased by 6d. per gallon.

Permits to fit producer gas units are being issued in New South Wales at the rate of approximately 200 per week but a shortage of acetylene gas containers is holding up welding work involved in fitting the units.

N.S.W.

MOTOR VEHICLES REGISTERED AND NEW REGISTRATIONS.

Number Registered		Aug. 1939.	Nov. 1941.	Mar. 1942	July 1942	Aug. 1942
Cars	( '000 )	217	191	173	170	170
Lorries & Vans	( '000 )	78	75	73	71	71
Total	( '000 )	329	298	274	267	267
New Registrations - Av.						
No. per week -						
Cars & Cabs	No.	322	39	13	13	17
Lorries & Vans	No.	146	50	19	8	4

/TRAMS .....



TRAMS & BUSES.

Passengers carried by departmental omnibus and tramway services in July, 1942 were estimated at 59.7 million or one-third as large again as in July 1939. The surplus of earnings over working expenses has in recent months been running at lower levels than last year though comparing favourably with 1939 and 1940. In the Newcastle area the working surplus has improved greatly and for the year ended June, 1942, was nearly double the 1939/40 result.

Reduced omnibus services in slack hours and on non-business days came into effect on Sept. 27th, 1942. There is an estimated saving of 2 million miles a year.

N.S.W. GOVERNMENT TRAMS & 'BUSES.

SYDNEY & NEWCASTLE.

Year	MONTH OF JULY.				YEAR ENDED JUNE.			
	Earnings	Working Expenses ★	Excess-Earnings over Working Expenses. ★	Passenger Journeys ♢	Earnings	Working Expenses ★	Excess-Earnings over Working Expenses ★	Passenger Journeys ♢
	£000	£000	£000	million	£000	£000	£000	million
1939	351.1	308.1	43.0	29.9	4,374	3,707	667	375
1940	371.2	314.2	57.0	31.6	4,468	3,768	700	378
1941	428.0	360.9	67.1	38.1	4,790	3,932	858	407
1942	453.3	403.5	49.8	39.7	5,429	4,646	783	477

★ Excl. Sinking Fund, Interest, Exchange and Current Depreciation which in 1941-42 amounted to £605,000.  
♢ Excluding Harbour Bridge tickets.

In order to conserve man power, fuel and plant certain reductions have been made in harbour ferry services.

